



U.S. General Services Administration

# Federal Acquisition Service

## CPRM Industry Partner Meeting

May 31, 2016

# Agenda

- Purpose of the CPRM Industry Partner Meeting
- Next CPRM Release, Jun 10, 2016:
  - Added Issuing Agency / Issuing Bureau to Order Data form
  - Updated logic for data pushed from ITSS to CPRM
  - Updated Logic for Active Flag
  - New Agency CAF Rate Rule
- Updated Training Modules
- Questions / Answers

# Purpose of CPRM Industry Partner Meeting

- A method to share the following:
  - Overview of next release of enhancements
  - Feedback on capabilities/requirements/future enhancements being considered
  - Opportunity to share Industry Partner comments or recommendations
  - Opportunity to discuss issues with the CPRM from the Industry Partner point of view
- Attendees
  - Voluntary
- Frequency
  - Quarterly

## June 10, 2016 Release Summary

### ➤ Enhancements:

- CHG90930 – Added Issuing Agency / Issuing Bureau to Order Data form
- CHG92647 – Updated Logic for data pushed from ITSS to CPRM
- CHG94304 – Updated Logic for Active Flag
- CHG94305 – New Agency CAF Rate Rule

### ➤ Defect Corrections

- CHG94985 – Correct 'Invalid Order' message on CAF Payment Data form

## CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

- The purpose of this change is to enable the Issuing Agency and Issuing Bureau to be identified for each order
- We added the following:
  - New fields on the Order Data form:
    - Organization – only utilized when the Ordering Contracting Officer name is found in the list of existing OCOs.
    - Issuing Agency – required field
    - Issuing Bureau – required field
    - Copy Issuing Agency/Bureau to Receiving Agency/Bureau
  - Soft validation message if the system detects that the Issuing Agency / Bureau has changed

# CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

**Contract Payment Reporting Module**  
You are signed in as

**IT-Solutions** **CPRM**

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

**WELCOME** **CAF PAYMENTS** **ORDERS** **INVOICE DATA** **CPRM COMMUNICATIONS**

## Order Data

This information pertains to an awarded task order as reported by the Prime Industry Partner Awardee.

Contract Number :

Ordering Contracting Officer :

Organization :

Issuing Agency : --Select--

Issuing Bureau : --Select--

Copy Issuing Agency/Bureau to Receiving Agency/Bureau? ☐ Yes

Receiving Agency : -- Select --

(for self-service, receiving agency may be same as issuing agency)

Receiving Bureau : --Select--

Location : -- Select --

Place of Performance Enter the single, primary Place of Performance City, State, and Country.

Street Address 1 :

Street Address 2 :

City :

**New Fields presented on the Order Data Form in new / edit mode:**

- Organization
- Issuing Agency
- Issuing Bureau

**In the Ordering Contracting Officer field:**  
If the user enters the name of a registered OCO user, then the system will populate the fields with data from the OCO's ASSIST Registration data and it will be stored with the order when submitted.

**If the user enters an email address, then the system will not populate the Organization field and the user will be required to select an option from the Issuing Agency / Issuing Bureau fields. The selections will be stored with the order when submitted.**

**Also new:**  
User can click the checkbox to copy their Issuing Agency / Issuing Bureau selections to the Receiving Agency / Receiving Bureau fields.



# CHG90930 - Added Issuing Agency / Issuing Bureau to Order Data form

**GSA** **Contract Payment Reporting Module**  
You are signed in as

IT-Solutions CPRM

Guide Me • Site Help • Contact Us • Need Assistance • Log Out

WELCOME CAF PAYMENTS ORDERS INVOICE DATA CPRM COMMUNICATIONS

### Search For Order Data

Order Number :  Date Range :

Data displayed in the Agency column reflects the Issuing Agency associated to the order. If 'Unknown' is presented in this position, the order may be edited and the Issuing Agency can be set on the order.

Active :  Yes / No

Contract Family :

-- Select --  
BMO Zone 1 Small Business  
BMO Zone 1 Unrestricted  
Connections  
Select all that apply  
Hold "Ctrl" and click to select multiple values

Search

2 items found, displaying all items.

Order Number	Award Date	Agency	Description	Total Obligated/Funded Amount	Active	Contract Family
AH051916-01	09/25/2015	DEPARTMENT OF INTERIOR	Program Management, Management Consulting	\$10,050,000.00	Yes	OASIS
AH052016-01	09/25/2015	DEPARTMENT OF THE NAVY	Financial, Engineering	\$10,000,000.00	Yes	OASIS

Show 10 items per page.

Cancel

## **CHG92647 – Update Assisted Services Trigger (slide 1 of 2)**

- The purpose of this change is to maximize the data populated in CPRM from award data in ITSS
- Additional fields will populate in CPRM when an order is awarded in ITSS, as follows:
  - Estimated Ultimate Completion Date – populated with the POP End Date. When a mod is awarded, if the existing Estimated Ultimate Completion Date is earlier than the new POP End Date, then the Estimated Ultimate Completion date will be updated to the new POP End Date.
  - Functional Area – if the contract is associated to a single functional area, then the order will be populated with that functional area.



## CHG92647 – Update Assisted Services Trigger (slide 2 of 2)

- Additional Fields, continued...
  - Number of Bids – populated from ITSS
  - Predominant Contract Type – populated from ITSS
  - Predominant Order NAICS Code field – if the contract is associated to a single functional area, and if that functional area is associated to a single NAICS code, then the order will be populated with that NAICS code.
  - Sourcing / Method of Award – If the solicitation is conducted in ITSS or e-Buy, then the Sourcing / Method of Award field will be populated with 'ITSS' or 'e-Buy', respectively. Otherwise, the field will be populated with 'Other'.
  - Total Estimated Value – populated with the Total Funded Amount. Existing functionality is unchanged for mod awards.

## CHG94304 – Update Active Flag Logic

- The purpose of this change is to improve the accuracy of the Active Order setting.
- A nightly job runs to update the Active setting in CPRM.
- The nightly job was updated to set the Active Flag to 'Y' if the current date is within the order's Period of Performance.
- Note: the nightly job already functioned to set the Active Flag to 'N' when the current date is not within the order's Period of Performance.

## CHG94305 - New Agency CAF Rate Rule

- The purpose this change is to enable the GSA to define CAF Rate rules for a particular contract family and agency pair.
- The system will match the new Agency CAF Rate rule to orders where there is a match on:
  - Contract Family
  - Agency (can be set to match on Issuing Agency and/or Receiving Agency)
  - Rule Date Range and Order Period of Performance

## Order Data

This information pertains to an awarded task order as reported by the Prime Industry Partner Awardee.

Contract Number : GS00Q09BGD00

Contract Family : FAS Alliant GWAC

Period of Performance : 10/01/2015 - 09/30/2016

Estimated Ultimate Completion Date : 09/30/2016

Active : Yes

Initial Award Date : 09/25/2015

Initial Obligated/Funded Amount : \$50,000,000.00

Total Obligated/Funded Amount : \$50,000,000.00

Total Estimated Value : \$50,000,000.00

Invoice Data Amount : \$491,566.60

Closed Out : No

Ordering Contracting Officer : uat.example@agency.gov

Organization :

Issuing Agency : DEPARTMENT OF EDUCATION

Issuing Bureau : INSTITUTE OF EDUCATION SCIENCES

Receiving Agency : DEPARTMENT OF EDUCATION

Receiving Bureau : FEDERAL STUDENT AID

Location : Nationwide

Example: There is an Agency CAF Rate rule with the following attributes:

- Contract Family = FAS Alliant GWAC
- Agency = Department of Education (for issuing agency)
- Date Range: 01/01/2015 – 12/31/2016

## Invoice Data ( add )

5 items found, displaying all items.

Invoice Data #	Date	Amount	EST CAF Amount
UPL_INV1	10/31/2015	\$24,523.87	\$1,167.80
UPL_INV2	11/30/2015	\$124,351.28	\$5,921.49
UPL_INV3	12/31/2015	\$135,725.86	\$6,463.14
UPL_INV4	01/30/2016	\$139,442.16	\$6,640.10
UPL_INV5	02/25/2016	\$67,523.43	\$3,215.40
Total Amount (All Invoice Data):		\$491,566.60	\$23,407.93

## Supporting Order Data

Date Created	Created By
05/23/2016	

## CAF Payment Data

One item found.

Applicable Rule Type	Rule Scope	Rate	Max Pmt	Date Range
Agency	DEPARTMENT OF EDUCATION	5.00%	Unlimited	10/01/2015 - 09/30/2016

Voucher Number	Remit Date	Payment Amount	Status
No CAF Payments Found.			

Total Amount (All Payments, Excluding Rejected Payments):

\$0.00

## CHG94985 – Correct ‘Invalid Order’ message on CAF Payment Data form

- The issue: when a contractor user attempts to edit an existing, pending CAF Payment Data form by adding a new order to the CAF Payment Allocations table, the system presents the ‘Invalid Order Number’ error message. This message is presented even when the order is a valid order to add to the form.
- The correction: the system will no longer present the Invalid Order Number message when valid orders are added to the form.
  - Valid orders:
    - The order must be for the same contractor company and contract family as stated on the CAF Payment Data form.
    - The order must have invoice data submitted for the order.

# CHG94985 – Correct ‘Invalid Order’ message on CAF Payment Data form

**Contract Payment Reporting Module**  
 You are signed in as

IT-Solutions
 CPRM

[Guide Me](#) • [Site Help](#) • [Contact Us](#) • [Need Assistance](#) • [Log Out](#)

WELCOME
 CAF PAYMENTS
 ORDERS
 INVOICE DATA
 CPRM COMMUNICATIONS

## CAF Payment Data

This information pertains to the reconciliation data needed to properly identify each Contract Access Fee (CAF) payment made by an Industry Partner Awardee and to "allocate" those payment amounts against the individual task orders the payment comprises of (i.e. actual payments usually represent contributions from multiple task orders). Therefore, each CAF payment remitted by an Industry Partner Awardee must be reported in this way. However, keep in mind that payments can only be combined by contract family for task orders that have been reported in this system.  
 For further information regarding the electronic payment information packet please [click here](#).

Status : Pending

Contractor Company : TEST COMPANY INC

Contract Family : Connections II

Report Date : 05/31/2016

Remit Payment Date : 05/19/2016

Voucher Number : ahvchr-02

Total CAF Payment Amount : \$31.00

### CAF Payment Allocations

Allocated : \$31.00 / Remaining : \$0.00

NOTICE: The Estimated Outstanding CAF Payment amount is based upon the invoice data your company has reported in the system. If you are missing invoice data, the Estimated Outstanding CAF Payment amount will be incorrect. All Invoice Data must be verified / validated.

Order Number	Total Obligated/Funded Amount	Last Invoice Date	Invoked Amount	CAF Payment Reported	CAF Payment Received	Est Outstanding CAF Payment	Amount Allocated	
ORDER-01	\$21,814,783.90	02/02/2016	\$9,396,063.06	\$138,545.33	\$138,518.33	\$312.75	\$12.00	✗
ORDER-01	\$373,795.03	04/21/2016	\$290,083.55	\$32.00	\$0.00	\$3,966.90	\$19.00	✗

Zero 'Amount Allocated' entries will not be saved.

Add CAF Payment Allocation for Order Num: AH051916-01 Add

Invalid Order Number

Submit Cancel



# OTHER TOPICS

# Updated Training Materials

The screenshot shows the GSA ASSIST web application interface. At the top, there is a header with the GSA ASSIST logo, navigation tabs (WELCOME, MY PROFILE, CAF PAYMENTS, ORDERS, INVOICE DATA, CPRM COMMUNICATIONS), and a user welcome message. Below the header, the main content area is titled 'Contract Payment Reporting Module'. It features an 'Action Items' section with a table that currently shows 'You have no action items'. To the right of the main content, there are several sidebar sections: 'Welcome to the Contract Payment Reporting Module' (describing the module's purpose), 'Reports' (with links for CPRM Task Order Awards and CPRM Task Orders by Company), 'Training' (with a link for Access to Training Modules, which is circled in red), 'System Announcements' (with an 'Entries' button), and 'CPRM Informational Links'.

**GSA ASSIST**

Welcome, |  
AASBS HELPDESK: 877-472-4877  
AASBS.HELPDESK@GSA.GOV

IT-Solutions CPRM

WELCOME MY PROFILE CAF PAYMENTS ORDERS INVOICE DATA CPRM COMMUNICATIONS

### Contract Payment Reporting Module

#### Action Items

Type	Age (Days)	Order Number	Requestor	Contract Family
You have no action items				

Showing 0 results.

#### Welcome to the Contract Payment Reporting Module

The Module was designed to meet the reporting needs of stakeholders, including the Office of Management and Budget (OMB) and client agencies, and to facilitate the Contract Access Fee (CAF) payment reconciliation by GSA's Industry Partners.

#### Reports

- [CPRM Task Order Awards](#)
- [CPRM Task Orders by Company](#)

#### Pricing Estimation Tool (PET)

[Pricing Estimation Tool \(PET\)](#)

#### Training

[Access to Training Modules](#)

#### System Announcements

[Entries](#)

#### Directory

**Registration:** [Client](#), [Contractor](#), [GSA](#), [Registering for Clients or Contractors](#)

**IT-Solutions:** [Overview](#), [Web site](#), [GSA](#), [Browser Requirements](#), [Firewall issues](#), [Help Lite - Vendors](#), [Help Lite - Clients](#)

#### CPRM Informational Links

# Updated Training Materials

[Close Window](#)

[FAQs](#)
[Tell Me About...](#)
[Glossary](#)
[Index](#)

## Help - CPRM Training Modules

The CPRM has a number of training modules to help you learn how to use the system. In each case, please download the PowerPoint show from the links below. Once downloaded to your computer, double-click to start the show.

### Module 1

**CPRM Industry Partner Overview Training Module**  
 [Last Update: December 2015] The training module below provides a high-level overview of the Industry Partner (Contractor) responsibilities in the Contract Payment Reporting Module (CPRM).

Version	Download
Powerpoint Show - Silent (no audio narration)	<a href="#">CPRM_Overview_Training_Contractors_100215.ppsx</a>

---

### Module 2

**CPRM Advanced Instruction on Workflow and System Access**  
 [Last Update: December 2015] The training module below provides detailed instruction for Contractor Users on the CPRM Contractor Workflow and how to access the CPRM system.

Version	Download
Powerpoint Show - Silent (no audio narration)	<a href="#">LIVE_CPRM_Advanced_Training_Workflow_Access_Module_Contractors_100215.ppsx</a>
Powerpoint Show - Narrated with audio	<a href="#">Click Here to Access</a>

---

### Module 3

**CPRM Advanced Instruction on Order Data and Order Mod Data**  
 [Last Update: December 2015] The training module below provides detailed instruction for Contractor Users on the how to enter Order Data and Order Modification Data into the CPRM System.

Version	Download
Powerpoint Show - Silent (no audio narration)	<a href="#">LIVE_CPRM_Advanced_Training_Order_Data_Module_Contractors_100215.ppsx</a>
Powerpoint Show - Narrated with Audio	<a href="#">Click Here to Access</a>

---

### Module 4

**CPRM Advanced Instruction on Invoice Data and CAF Payment Data**  
 [Last Update: December 2015] The training module below provides detailed instruction for Contractor Users on the how to enter Invoice Data and CAF Payment Data into the CPRM System.

Version	Download
Powerpoint Show - Silent (no audio narration)	<a href="#">LIVE_CPRM_Advanced_Training_Invoice_CAF_Module_Contractors_100215.ppsx</a>
Powerpoint Show - Narrated with Audio	<a href="#">Click Here to Access</a>

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only." [Privacy Statement](#)

All Modules were updated in March 2016 and will be updated again for the May 2016 Release

# Open Discussion

- Comments
- Feedback
- Questions